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JANUARY 2018 – OOH OVERVIEW

NOVEMBER 2017

FOR A LANDSCAPE OF POSSIBILITIES



TOP 10 OOH ADVERTISERS – JANUARY 2017



£3.49m



£3.28m



£2.31m

easyJet

£2.25m



£1.78m

TESCO

£1.72m



£1.71m



£1.68m



£1.45m



£1.45m

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Source: Nielsen

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TOP 10 CATEGORIES – JANUARY 2017



ENTERTAINMENT & LEISURE

£13.75m



TELECOMMS

£12.23m



TRAVEL & TRANSPORT

£9.94m



MOTORS

£6.67m



GOV, SOCIAL & POLITICAL

£6.02m



FINANCE

£5.36m



RETAIL

£4.79m



FOOD

£3.93m



DRINK

£3.91m



MEDIA

£2.21m

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Source: Nielsen

FOR A LANDSCAPE OF POSSIBILITIES

JANUARY RETAIL SALES SLOWING DOWN AMID BREXIT CONCERNS AND THE GLOBAL ECONOMY

- The retail industry is estimated to have increased by 1.5% compared with Jan2016 - the lowest growth since Nov 2013
- Average store prices increased by 1.9% on the year – fuelled by the weak pound
- Online outperforms the market – increasing by 10.1% yoy and accounting for 14.6% of all retail spending – with click and collect the preferred option of many
- **It's now more important than ever for brands to advertise during such a key retail moment during a time of slow growth**



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Source: ONS

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NEW YEAR'S RESOLUTIONS: PEOPLE ACTIVELY WANT CHANGE

People want to actively change, learn something new, try different things and are more open to new experiences



- 10 million smokers in the UK, with two-thirds wanting to quit
- On average, in the process of quitting, people will increase expenditure on food
- January is a time when hope and optimism is strongest



- 64% of singletons want to find love in the new year
- The dating game causes high social activity in bars, restaurants and cinemas
- January is the boom month for online dating, with 3.2 million users

HOLIDAYS AND TRAVEL



Source: Expedia, ABTA

- Predicted yoy growth for January holiday sales for the next 3 years
- 70% believe that having a holiday to look forward to is the key to fighting the winter gloom
- 1 in 3 see a holiday as an 'essential buy' to start the new year with a bang
- City breaks and Winter Sun holidays in January are also on the up (19%) as people take advantage of cheaper deals and less crowded destinations

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Q1 IS A KEY TIME FOR HOLIDAY BOOKINGS



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Online searches related to holidays, cruises and skiing all increase in January

Travel +21%
Holidays +36%
Skiing +26%
Cruise +25%

Source: Primesight

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HEALTH AND FITNESS FOCUS

- January is **the key** time for brands to be targeting health and fitness
- 4 in 5 Brits start a 'health kick' in January
- Last January £2.8 billion was spent on getting into shape
- 'Dry January' is on the up with 39% of people ditching the booze in exchange for health drinks



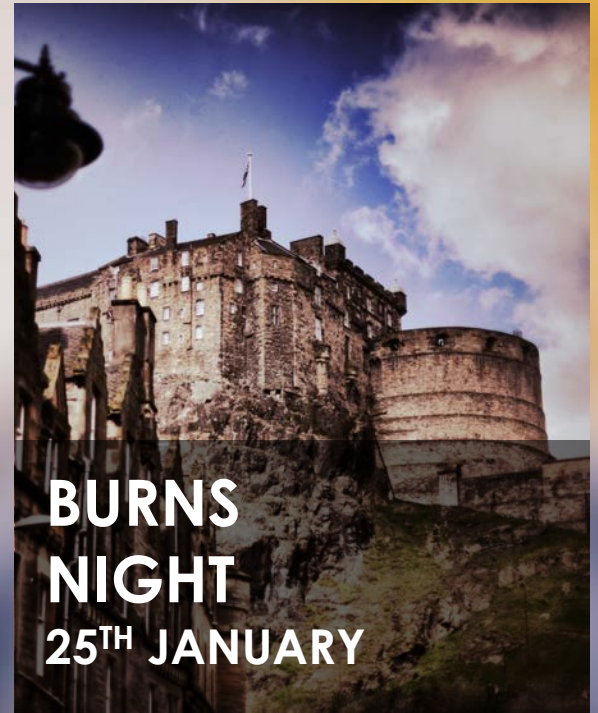
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'BLUE MONDAY' – 15TH JANUARY



- Calculated by a variety of factors: weather, debt, failed resolutions and the number of days that have elapsed since Christmas
- Travel retailers see sales peak on this day as consumers attempt to combat the 'back to work blues'
- There is plenty of scope for brands to utilise this event using DOOH
- In 2014, Waitrose saw sales increase by 20% on comfort foods such as ready meals and single serve desserts

KEY EVENTS IN JANUARY 2018



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POST CHRISTMAS SALES

- Half of us visit the High Street and malls for sales after Christmas (66% of 15-24s)
- 53% of people partake in the online sales (64% of 16-24s)
- A number of consumers that think that the post-Christmas period is the time to start planning for the next year
- 1 in 4 have made a pact with family to buy Christmas presents in the sales



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POST CHRISTMAS TRENDS

High street
footfall
increases
by over 50%
during post
Christmas

Half of us
visit friends
& family
(55% of 16-
24s)

42% visit a
shopping
mall
(55% of 16-
24s)

On average
9.8 million
will go
shopping

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